Dr. Andreas Svoboda

Lecturer | Mentor | Finance & Wealth Planning Expert

Professional Summary

Dr. Andreas Svoboda is a distinguished finance and insurance expert with over two decades of experience. Holding a Doctor of Business Administration (DBA) and an LL.M. in International Business Law, he is also a Certified Financial Planner (CFP) and a Fellow of the Association of Chartered Certified Accountants (FCCA). His career encompasses leadership roles in prominent financial institutions, academic contributions, and authorship, reflecting a profound commitment to advancing financial literacy and ethical practices.

Professional Experience

Partner & Executive Board Member

Q Wealth AG, Switzerland

- Co-founded and strategically developed the firm, focusing on sustainable wealth management solutions.
- Led initiatives to obtain FINMA licensing, ensuring compliance with Swiss financial regulations.

Managing Director Senior Advisor

Bank Julius Bär & Co. AG

- Provided strategic advice on wealth management to high-net-worth clients.
- Enhanced client portfolios through tailored investment strategies.

Head of Finance

UBS International Life Ltd.

- Oversaw financial operations, ensuring regulatory compliance and financial stability within the international life insurance

Teaching & Academic Experience

Lecturer & Professor

SBS Swiss Business School

- Educates students in finance, banking, and global markets, integrating real-world experience into academic curricula.

Head of Finance and Leadership, Banking and Finance

Swiss Distance University of Applied Sciences (FFHS)

- Leads academic programs, mentors students, and conducts research in financial risk management and investment deci

Founder & Lecturer

Vision Goal GmbH

- Provides high-quality education and mentoring for finance professionals.
- Conducts specialized workshops on financial planning and wealth management.

Publications and Thought Leadership

Books:

- Family Business Management - A guide to mastering the complexities of running a family enterprise.
- Whispers of the Mind - Exploring personal development and the psychology behind decision-making.
- The Psychology of Money - Understanding the emotions behind financial decisions and how they impact financial succes

Research Articles (Selection):

- Building an ESG Investment Portfolio - Strategies for sustainable investing.
- The Impact of Artificial Intelligence on the Banking Industry - Analyzing how AI is transforming financial services.
- The Democratization of Diversification: How Exchange-Traded Funds (ETFs) Are Transforming Investment Strategies.

Certifications & Further Education

- Certified Financial Planner (CFP) (2021)
- SVEB 1 Certificate (Adult Education) (2021)
- Financial Planner with Federal Diploma - IfFP Institute for Financial Planning (2018)
- Chartered Certified Accountant (FCCA) (2008 - 2010)

Education

- LL.M. International Business Law - University of Zurich (2018 - 2020)
- MSc in Professional Accountancy - University of London (2018 - 2019)
- Doctor of Business Administration (DBA) - University of Liverpool (2010 - 2017)
- Master of Business Administration (MBA) - University of Southern Queensland (2002 - 2004)

Languages

German (Native) | English (Fluent) | French (Basic)